LEADMASTER

Managing Marketing Campaigns and Measuring ROI with LeadMaster

LeadMaster makes it easy to track the results of your marketing campaigns and measure your return on investment (ROI) for the money you spend on marketing programs. This document contains step-by-step instructions to show you how. Should you need assistance your LeadMaster representative will be happy to help you.

Once you've setup LeadMaster to track your marketing campaigns you'll be able to see:

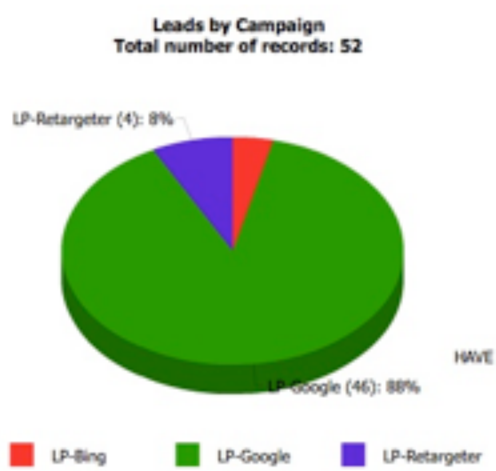
- How many sales leads you've generated from each marketing program.
- How much each of those leads cost to generate.
- How many deals you've closed as a result of each marketing campaign.
- How much you've sold as a result of each marketing campaign.
- How many leads are in each sales stage for one or more marketing campaigns.
- Your return on investment for each marketing campaign and overall.

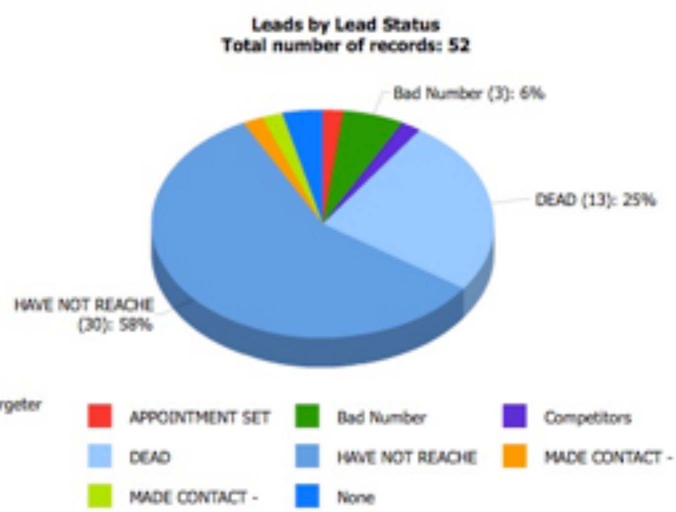
You'll be able to have real-time charts on your dashboard so that you'll know what's happening with your marketing programs at a glance.

Marketing ROI Report — Records 1 thru 6 - (6 total

Sorted By: Campaign Name

Campaign Name	ID	Campaign Type	Campaign Manager	Launch Date	Investment	Total # of Leads	Cost per Lead	# of Deals Won	Total Value
Adwords Dec 2010	STY2	Advertisement	John Hancock	5/1/2010	$5,000.00	22	$227.27	2	$220,000.00
Adwords Nov 2010	RAV	Advertisement	John Hancock	6/1/2010	$5,000.00	23	$217.39	3	$220,000.00
Adwords Oct 2010	0001	Advertisement	John Hancock	10/1/2010	$5,000.00	32	$156.25	3	$83,500.00
Seminars	Seminars				$1,000.00	100	$10.00	0	$0.00
Webinar - New Product	Webinars	WEB/e-mail			$1,000.00	36	$27.78	5	$560,000.00
Website Visitor	Website Visitor				$0.00	338	$0.00	0	$0.00
Grand Total					$17,000.00	551		13	$1,083,500.00





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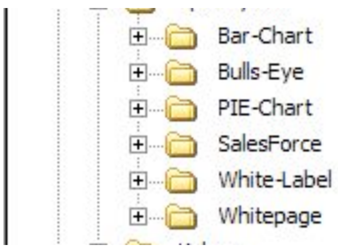
1. **The first step is to create a unique landing page on your web server for each marketing message you want to track. You can start with just one landing page.**

   For example, LeadMaster has individual landing pages for each the following advertising messages:
   a. Lead Management
   b. CRM
   c. Opportunity Management
   d. Email Marketing
   e. Sales Management
   f. Marketing Automation

   Here's an image of a LeadMaster Landing page with an advertising message for Lead Management.

   If you have leads coming from other marketing campaigns besides landing pages (email, lead generators, webinars etc.) we'll setup campaigns to keep track those in Step #3.

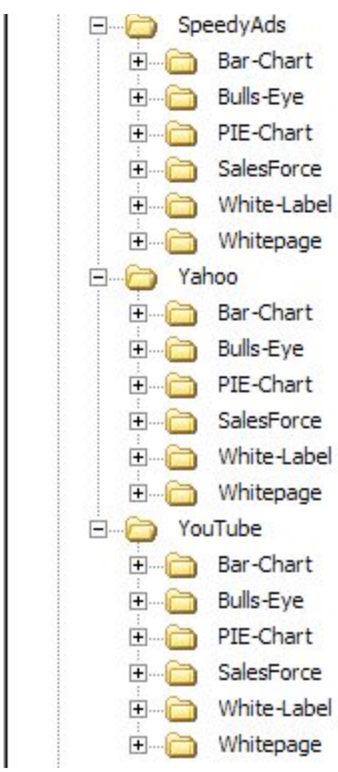
   I like to have a different image for each different type of message. If you're going to have more than a couple of landing pages you'll want to keep them organized. In the image below you'll see folders on the web server with landing pages called Bar-Chart, Bulls-Eye, Pie-Chart, SalesForce, White-Label and Whitepage.



Each of these folders contains a unique landing page with a specific message:

a. Lead Management = Bar Chart
b. CRM = Bulls-Eye
c. Opportunity Management = Opportunity Management
d. Email Marketing = SalesForce
e. Sales Management = White-label
f. Marketing Automation = Whitepage

2. **Once you've created unique landing pages for each of your messages you'll need to put a copy of each landing page in a directory for each advertising provider** (e.g. Google, Bing, etc) – in the image below are folders with ads to run on SpeedyAds, Yahoo & YouTube.



a. If you are using the same landing page across multiple advertising outlets (a good idea to test the effectiveness of each advertiser) simply place the landing page in a unique directory for each ad outlet – I've chosen to name the directories the same as the name of the advertising outlet. I find that it makes it easier to keep track of things.

b. If you are using the same 10 landing pages (Bar-Chart, Bulls-Eye, Pie-Chart etc.) with multiple advertising outlets (Google, Bing, SpeedyAds etc) simply place all 10 landing pages in a unique directory. Don't forget to give each a unique title and description in the meta tags.

Here's an example of the path to the landing page.

http://www.leadmaster.com/LP/Bing/SalesForce/LP's/Easier-Than-Salesforce.html

Here's how I have the landing pages organized on the web server.

- All the landing directories are in the LP directory
  - At this level I have a directory for Google, Bing, SpeedyAds etc.

- All the Bing landing pages are in the Bing directory in the LP directory.
  - At this level I have landing pages for Lead Management, Email Marketing, CRM, Opportunity Management etc

3. **The third step to tracking your marketing campaigns and marketing ROI is to create a Campaign in LeadMaster for each advertising marketplace – e.g. LP-Bing, LP-Facebook, LP-Google etc.** If you have leads coming from other marketing efforts such as email, lead generators, etc. you'll need to setup a LeadMaster Campaign for each of those as well. I like to make the campaign name and campaign ID identical to make it easier to track and recognize where the leads came from.

LP-Bing	9/10/2010	LP-Bing	edit | delete
LP-Facebook	9/10/2010	LP-Facebook	edit | delete
LP-Google	9/10/2010	LP-Google	edit | delete

When new leads come into LeadMaster they can be assigned a Campaign so that you know where that lead came from and if that lead buys something you'll be able to track the ROI for that marketing campaign. This is true whether the lead is coming from a landing page, an email, a lead generator etc. You'll always want to assign a Campaign when a new lead comes into the system so you can track where that lead came from.

In the image below you'll see a portion of a record in the LeadMaster system where the campaign is identified as LP-Google. In other words this lead came from a Google Landing Page.

Account Manager New Unassigned
Partner
Partner Rep
Campaign LP-Google

In LeadMaster there are 3 ways to assign the campaign when new leads come in from landing pages.

- Have a hidden field on your landing page.
- Use the Profile fields on your custom form.
- Use Workflow Automation to assign the campaign.

I prefer to use either a hidden field on the landing page or the profile field on the custom form so that I can do Marketing Automation based upon the new lead coming in from that campaign (e.g. send a 'Thank You' email, assign the lead etc.). Below is an example of setting up a Custom Form Profile Field to track the campaign.

Profile Fields [Submit] [Go Back]

Active	Database Field	Field Label	Field Order	Required	Is Hidden	Default Value
☑	Leaddb.mkt_program_id	Campaign	1	☐	☑	LP-LinkedIn
☐	Leaddb.Call_Back_Date	Call Back Date	1	☐	☐	

The campaign tells us which advertising marketplace generated the lead but we also want to keep track of which individual landing page generated this lead so that we know which landing pages are more effective than others. The next step shows how LeadMaster keeps track of which landing page brought in which leads.

4. **The next step in tracking your marketing campaigns and ROI is making sure LeadMaster records the specific landing page that generated the lead.**

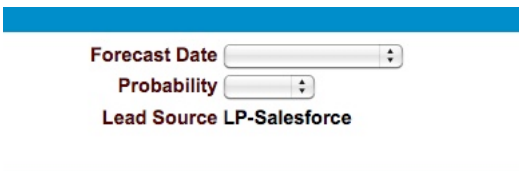
I like to use the 'Lead Source' field to keep track of the individual landing page that generated the lead. You have the same 3 options for entering the Lead Source in LeadMaster as you do for tracking the campaign (explained in the previous section).

- Have a hidden field on your landing page.
- Use the Edit Profile fields on your custom form.
- Use Workflow Automation to assign the campaign.

Here's an example of capturing the specific landing page using a hidden field.

```
<form name='frm' method='post' onSubmit="return validateForm()">
<input type='hidden' name="lm_CompanyID" value="18">
<input type='hidden' name="lm_FormID" value="942">
<input type='hidden' name="lm_FormKey" value="">
<input type='hidden' name="lm_FormResponsePage" value="http://www.leadmaster.com/LeadMaster-About
<input type='hidden' name="Landing Page" id="Landing Page" value="LP-Salesforce">
```

Here's how it shows up on a record in the LeadMaster system.



Here's a quick review of what we've done so far

- You've created your landing pages
- You've organized your landing pages into directories
- You've created Campaigns in LeadMaster and setup a tracking method using Campaigns
- You've setup a tracking method for identifying which landing page created which lead using the Lead Source field

Next you'll need to setup a custom form for each landing page. LeadMaster provides you with a tool called 'Map Web Forms to Custom Forms' which allows you to bring the data from your landing pages into LeadMaster. In order to use that tool and create custom forms you'll need access to Administration in LeadMaster.

5. **The next step in tracking your marketing campaigns and ROI is to create a unique Custom Form for each combination of landing page and advertising marketplace.**

    a. I suggest you name the custom form by combining the name of where the ad will be running (Google, Bing, LinkedIn etc) with the name of the landing page (Bar Chart, Bulls-Eye, Pie Chart etc). For example "LP LinkedIn Pie Chart"

    b. In the Custom Form Profile Fields you'll assign the Campaign, e.g. LP-LinkedIn

In the image below you can see that it might be easy to lose track of what's what if you've got both a lot of landing pages and a lot of advertising marketplaces.

937	LP LinkedIn Pie Chart	9/12/2010	http://www.crmtool.net/WebForm.asp?F=937&W=18	No	Web	edit | design | delete
943	LP LinkedIn Salesforce Easier	9/12/2010	http://www.crmtool.net/WebForm.asp?F=943&W=18	No	Web	edit | design | delete
949	LP LinkedIn Salesforce Less$	9/12/2010	http://www.crmtool.net/WebForm.asp?F=949&W=18	No	Web	edit | design | delete
957	LP LinkedIn Whitepage	9/12/2010	http://www.crmtool.net/WebForm.asp?F=957&W=18	No	Web	edit | design | delete
926	LP MyAds Bar Chart	9/12/2010	http://www.crmtool.net/WebForm.asp?F=926&W=18	No	Web	edit | design | delete
932	LP MyAds Bulls-Eye	9/12/2010	http://www.crmtool.net/WebForm.asp?F=932&W=18	No	Web	edit | design | delete
938	LP MyAds Pie Chart	9/12/2010	http://www.crmtool.net/WebForm.asp?F=938&W=18	No	Web	edit | design | delete
944	LP MyAds Salesforce Easier	9/12/2010	http://www.crmtool.net/WebForm.asp?F=944&W=18	No	Web	edit | design | delete
950	LP MyAds Salesforce Less$	9/12/2010	http://www.crmtool.net/WebForm.asp?F=950&W=18	No	Web	edit | design | delete
958	LP MyAds Whitepage	9/12/2010	http://www.crmtool.net/WebForm.asp?F=958&W=18	No	Web	edit | design | delete
927	LP SlideShare Bar Chart	9/12/2010	http://www.crmtool.net/WebForm.asp?F=927&W=18	No	Web	edit | design | delete
933	LP SlideShare Bulls-Eye	9/12/2010	http://www.crmtool.net/WebForm.asp?F=933&W=18	No	Web	edit | design | delete
939	LP SlideShare Pie Chart	9/12/2010	http://www.crmtool.net/WebForm.asp?F=939&W=18	No	Web	edit | design | delete
945	LP SlideShare Salesforce Easier	9/12/2010	http://www.crmtool.net/WebForm.asp?F=945&W=18	No	Web	edit | design | delete
953	LP SlideShare Salesforce Less$	9/12/2010	http://www.crmtool.net/WebForm.asp?F=953&W=18	No	Web	edit | design | delete
959	LP SlideShare Whitepage	9/12/2010	http://www.crmtool.net/WebForm.asp?F=959&W=18	No	Web	edit | design | delete
961	LP SLMA Bar Chart	9/16/2010	http://www.crmtool.net/WebForm.asp?F=961&W=18	No	Web	edit | design | delete
962	LP SLMA Bulls-Eye	9/16/2010	http://www.crmtool.net/WebForm.asp?F=962&W=18	No	Web	edit | design | delete
963	LP SLMA Pie Chart	9/16/2010	http://www.crmtool.net/WebForm.asp?F=963&W=18	No	Web	edit | design | delete
964	LP SLMA Salesforce Easier	9/16/2010	http://www.crmtool.net/WebForm.asp?F=964&W=18	No	Web	edit | design | delete

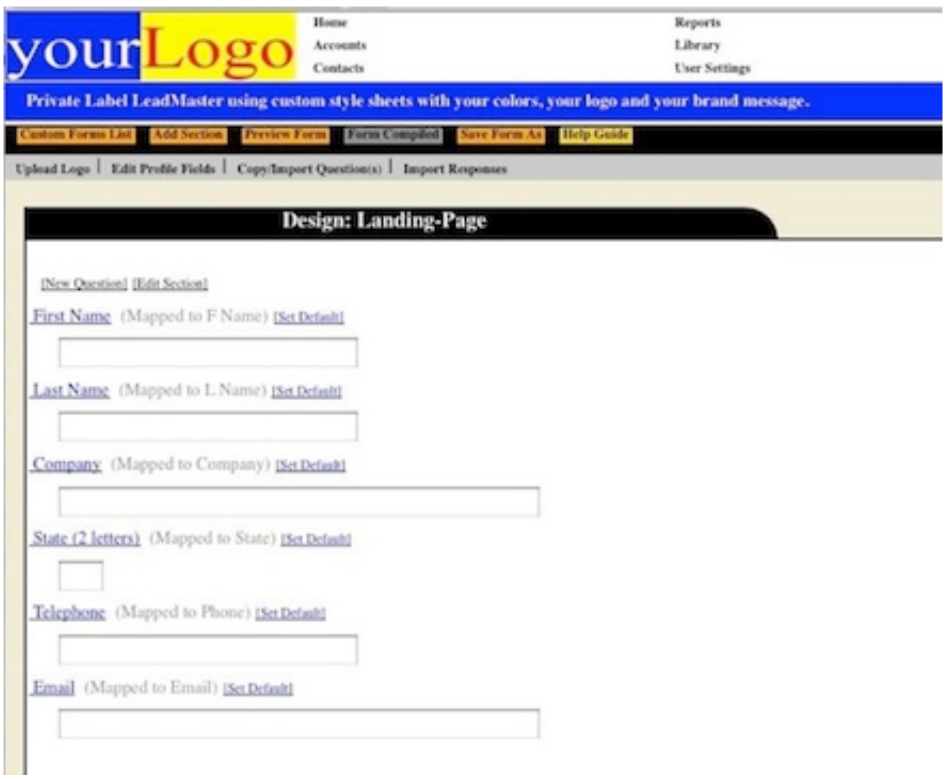
By setting your tracking up this way you'll be able to see exactly where your leads are coming from. For example, on the record for each lead you'll see:

- **Campaign** = LP-Google (the lead came from a Google landing page)
- **Lead Source** = LP-Pie Chart (the lead came from the Pie Chart landing page running on Google)

You can also search for all the records with Campaign = LP-Google. This will tell you how many leads you are receiving from Google. You can also filter your search to a specific timeframe like last week or last month.

6. **The sixth and final step in tracking your marketing campaigns and ROI is to map your landing pages to your custom forms in LeadMaster.**

Here's an example of a custom form with all the same fields as your landing page.

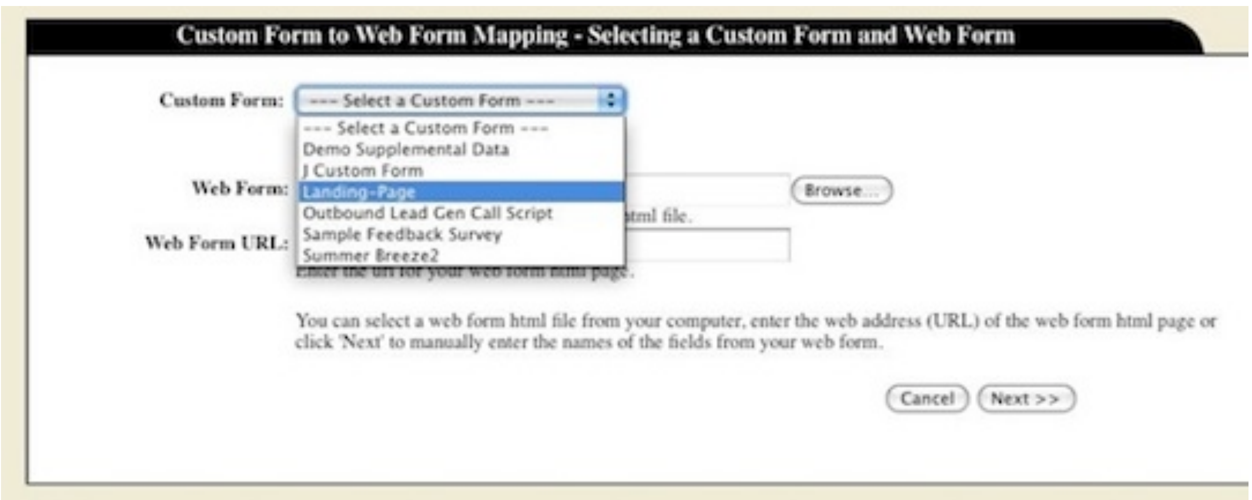


Make sure you've compiled your custom form. You compile the form by opening it and clicking the menu 'Compile Form'. Notice in the menus in the image above – the gray menu says 'Form Compiled'. The menu changes from 'Compile Form' to 'Form Compiled' once you click that menu and confirm that you indeed do want to compile the custom form. You can't use custom forms until they've been compiled.

Now you're ready to map your landing page to your custom form.

In order to use the ‘Map Web Form to Custom Form’ tool you need to have access to Administration. If you don’t see Administration in the top menu bar you’ll need to ask your administrator or LeadMaster representative to change your privileges to give you access to Administration.

Click on Administration and then click on ‘Map Web Forms to Custom Forms’. This is a wizard type of tool. Just follow the instructions on the screen. Select the custom form you’d like to map to your landing page – in the image below the custom form is called simply ‘Landing Page’.



There are two ways to match the fields on the landing page to the custom form, either:

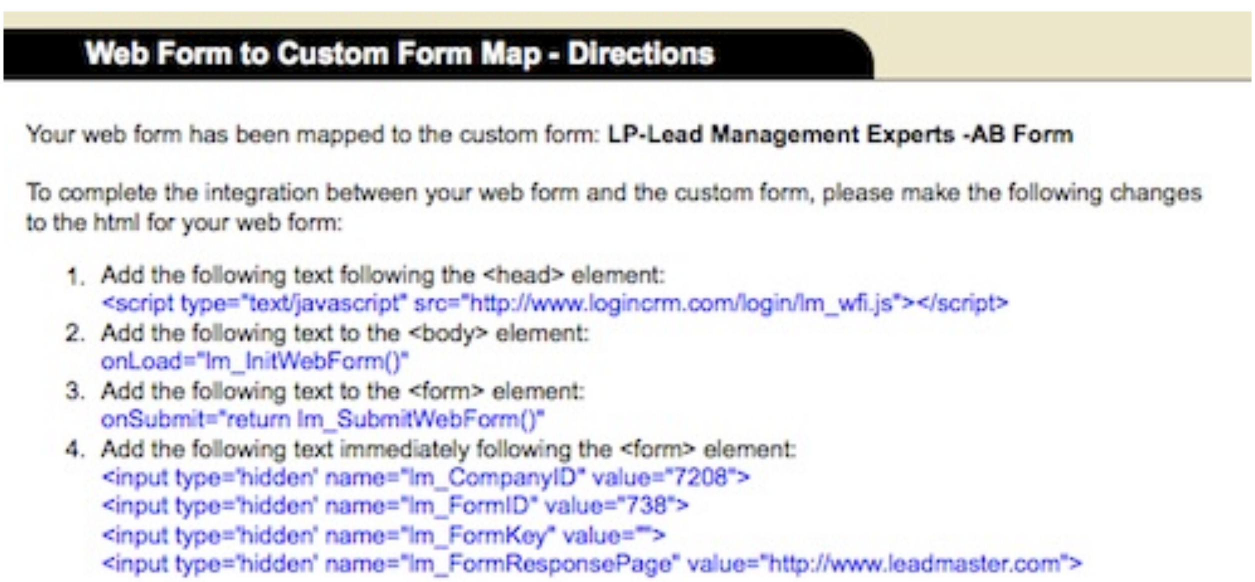
- Automatically using the Map Web Form tool or
- By hand

I prefer the ‘by hand’ method because there are simply too many web development tools to guarantee the format of the fields matches the tool.

Matching by hand is easy enough, simply type in the content of the ***field ID*** on the web form and click add. Then match that to the custom form fields, which are displayed automatically (see the image at the top of the next page).

This is very similar to importing records where you are matching the import fields with the system fields.

Ok, you're almost finished. Now that you've got the fields mapped in the LeadMaster system you need to add some code to your landing page to tell it to send the data to LeadMaster. Don't worry, you don't need to write the code, LeadMaster does that for you. All you need to do is copy and paste. Here's the code the mapping tool has created.



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You're now all set up to use LeadMaster to tracking your marketing programs and measure your marketing ROI. Once you've collected some leads from your marketing efforts you are ready to run the **Marketing ROI Report**.

Click on Reports / Click on Filter / Select the Campaigns you'd like to Report on – in the image below I've selected 6 campaigns using the LeadMaster Search Engine and then selected the Marketing ROI Report in the Marketing Reports section.

Marketing ROI Report

Records 1 thru 6 - (6 total

Sorted By: Campaign Name

Campaign Name	ID	Campaign Type	Campaign Manager	Launch Date	Investment	Total # of Leads	Cost per Lead	# of Deals Won	Total Value
Adwords Dec 2010	STY2	Advertisement	John Hancock	5/1/2010	$5,000.00	22	$227.27	2	$220,000.00
Adwords Nov 2010	RAV	Advertisement	John Hancock	6/1/2010	$5,000.00	23	$217.39	3	$220,000.00
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Seminars	Seminars				$1,000.00	100	$10.00	0	$0.00
Webinar - New Product	Webinars	WEB/e-mail			$1,000.00	36	$27.78	5	$560,000.00
Website Visitor	Website Visitor				$0.00	338	$0.00	0	$0.00
Grand Total					**$17,000.00**	**551**		**13**	**$1,083,500.00**

The Investment figure is automatically gathered from the 'Projected Expenses' on the campaign setup page.

The '# of Leads' is determined by records associated with that campaign. This information is gathered automatically because of what we did in step #3 above.

The 'Cost per Lead' is calculated automatically by dividing the 'Investment' by the 'Total Number of Leads'.

The '# of Deals Won' in the Marketing ROI Report is determined automatically by records that have Sales Stage = Closed Won in the Sales Progress section of the record.

Sales Progress

Lead Status	CUSTOMER	**Forecast Date**	December 2010
Initial Lead Grade	WARM	**Close Date**	
Lead Value	$100,000.00	**Probability**	25%
Sales Stage	CLOSED - WON	**Lead Source**	Banner Ads

Sales Rep Comments/Notes

The 'Lead Value' in the Sales Progress section of the record automatically determines the 'Total Value' in the Marketing ROI Report.

You can filter for any campaign or combination of campaigns. You can also filter for specific dates so you can have a Marketing ROI report for – a day, a week, a month, a year or any length of time.